



North Carolina Procurement Transformation

NC E-Procurement Ariba Buyer Upgrade March 2012



Agenda

- **Welcome & Introductions**
- **Ariba Buyer Upgrade**
 - NCID Interface
 - Testing & New Functionality
 - Historical Data Approach
 - Training & Communications
- **Questions & Answers**

Michael Jackman

Scarlett Swain

Jeff Harper

Laura Haakenson

Bryan Doepken



NCID Interface Status Update

Single point of administration and control for simplified management and standardized processes for the State, agencies, end users, and customer applications

- Current entity NCID collection and mapping status
 - 58 communications for State agencies with a **25%** response rate
- Next wave of communications starting in March
 - Will include new Buyer user data since the last reports
 - Will merge the existing responses as part of the new reports
 - Agency readiness will incorporate NCID responses
- Recommended processes associated to NCID user creation and communication
- Functional testing successfully completed as part of System Test Pass 3
 - The NC E-Procurement 9r1 system was integrated with an NCID test instance to verify user updates and authentications work as expected.



System Test Updates

The Ariba Upgrade team has completed execution of 3 passes of system testing.

- Completed 3 passes of System Testing
 - **95% Pass Rate; No Major Issues**
 - Continue working to resolve and retest remaining issues until code freeze takes effect
 - Continue working to test each integration touch point
 - Working with DOT on interface testing



New Functionality Highlights

Users can now search for values by entering the search criteria directly in the field and clicking “Enter”.

NCE-Procurement
@your service

A R I B A*

SPEND MANAGEMENT

[Home](#) | [Help](#) | [Logout](#)

Welcome Scarlett Swain

[Create](#) [Search](#) [Manage](#) [Recent](#) [Preferences](#)

RQ20000636: Untitled Requisition

Items: 0 Total: \$0.00000 USD [OK](#) [Cancel](#)

If you cannot locate an item in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get involved to complete the order. Add the ...

Full Description: *

Enter a description for this item.

Commodity Code: *

485

Supplier:

Search for more...

Location:

(no value)

ItemID:

(none selected)

WarehouseID:

(none selected)

Bid Number:

(none selected)

Supplier Part Number:

Recycled Content?

☐ Yes ☒ No

Item Classification:

Good

Contract Type:

No

Blanket Purchase?

☐ Yes ☒ No

Quantity:

1

Unit of Measure:

each

Stock Keeping Unit:

Conversion Factor:

1

SKU Quantity:

1

Price:

\$0.00 USD

Tax Rate:

Other

Tax Amount:

\$0.00 USD

Amount:

\$0.00000 USD

Update Total

ACCOUNTING - BY LINE ITEM

Company:

(none selected)

Account:

(none selected)

Center:

(none selected)



New Functionality Highlights

The “Search for more...” option will now produce a pop-up window with related search results. Commodity Code selection has been improved; users will now be able to drill through the commodity hierarchy, as well as searching on keywords in the description.

NCE-Procurement
@your service

ARIBA*

SPEND MANAGEMENT

Home

Create Search Manage Recent Preferences

Home | Help | Logout

Welcome Scarlett Swain

RQ20000636: Untitled Requisition

If you cannot locate an item in the catalog, re

Full Description: * Enter a description for

Commodity Code: * 485

Supplier: (No Preference)

Location: (no value)

ItemID: (none selected)

WarehouseID: (none selected)

Bid Number: (none selected)

Supplier Part Number:

Recycled Content? ☐ Yes ☒ No

Item Classification: Good

Contract Type: No

Blanket Purchase? ☐ Yes ☒ No

ACCOUNTING - BY LINE ITEM

Company: (none selected)

Account: (none selected)

Center: (none selected)

Choose Value for Commodity Code

Field: Name 485 Search

| Name ↑ | ID | |
|--|--------|--------|
| ▶ 145-00 - BRUSHES (SEE CLASS 485 FOR JANITORIAL TYPE) | 145-00 | Select |
| 435-70 - Skin Cleaners, Antimicrobial: Emollient, Nonalkaline, etc. (See Class 485 for Janitorial Hand and Skin Cleaners) | 435-70 | Select |
| 435-72 - Soap, Surgical Scrub (See 485-85 for Janitorial Type Scrubbing Soap) | 435-72 | Select |
| 436-70 - Skin Cleaners, Antimicrobial: Emollient, Nonalkaline, etc. (See Class 485 for Janitorial Hand and Skin Cleaners), Environmentally Certified Products | 436-70 | Select |
| 436-72 - Soap, Surgical Scrub (See 485-85 for Janitorial Type Scrubbing Soap), Environmentally Certified Products | 436-72 | Select |
| ▶ 485-00 - JANITORIAL SUPPLIES, GENERAL LINE | 485-00 | Select |
| 630-45 - Paint and Varnish Removers (Includes Painted Graffiti Removers) (See 485-16 for Other Types of Graffiti Removers) | 630-45 | Select |
| 631-45 - Paint and Varnish Removers (Includes Painted Graffiti Removers) (See 485-16 for Other Types of Graffiti Removers), Environmentally Certified Products | 631-45 | Select |
| 810-27 - Fogging Machines for Outdoor Service (See 485-60 for Room Type) | 810-27 | Select |

Done

Total: \$0.00000 USD

OK Cancel

olved to complete the order. Add the ...

Update Total

Local intranet | Protected Mode: On 100%



Historical Data Approach Parallel Integration Solution

A solution has been developed to keep the existing E-Procurement solution available for a limited time to allow users to complete open transactions.

- The current E-Procurement system will remain available for a limited time beyond implementation of the new E-Procurement solution, so that users may complete their open transactions only.
- Users will be limited to receiving or canceling open orders in the old system. Users can 'change' open orders but only to complete them by reducing the line item quantities to the amount already received.
- Access to receive or cancel in the 8.2.1 system will be available to the same users who currently have those permissions. No new users will be added.
- Users will not be able to create or submit any requisitions in the old system. All new transactions must be created in the new 9r1 E-Procurement system.
- Users will access the 8.2.1 system using their existing ID and password. Users will access the 9r1 system with their NCID.



Historical Data Approach

Open Transaction Processing and Reports

Agencies should continue to complete or close open transactions in the current E-Procurement system as we approach the new E-Procurement system go-live date.

- Update access to the current 8.2 E-Procurement system will eventually be disabled and at that point all data will be read-only, but copies will continue to be available through regular print methods.
- Open transactions must be completed and closed before update access to the current system is disabled to avoid 'abandoned' transactions in NCAS and to keep the systems in sync.
- Agencies should attempt to complete or close all open transactions by the end of the fiscal year to reduce the amount of transactions that need to be completed in the old system.
- Reports identifying open transactions in Ariba and NCAS will continue to be distributed to the agency designated recipients to support the process of completing open transactions.
- Agencies should continue to review the open transaction reports and work with their end users to complete the open transactions



Communications Activities

Training will be available in several formats to update current users on changes and provide training assets to be used going forward

- Updated **job aids** on the NC E-Procurement web site
- “What’s New” **classroom training** and **webinars**
- Online **training modules** providing a new means of training current and future system users on system functionality
- Watch for detailed schedules and **registration options** coming soon





Training Formats: Job Aids

Job Aids are PDF documents providing screenshots and detailed instructions for specific tasks and topics.

- There are over **450 pages of job aids** currently available in the User Training section of the NC E-Procurement web site
- These job aids are being **updated** to reflect the new functionality
- PDF files provide a **reference library** of materials available to all NC E-Procurement users
- Updated job aids will be posted in mid-April for a first look at what has changed

II. Add Items

Users can add catalog (Statewide Term Contract) items to their eRequisition from the 'Add Items' page using the catalog search functionality. From the 'Add Items' page, a user can also navigate to the eQuote and Punchout options, as well as choose to create a non-catalog item. Punchout, eQuote, and non-catalog requisitioning processes are covered in separate process guides.

Users can search the catalog using several methods, in addition to being able to browse the catalog by clicking a Supplier Name or Category. The user can click 'Options' to view additional search field options.

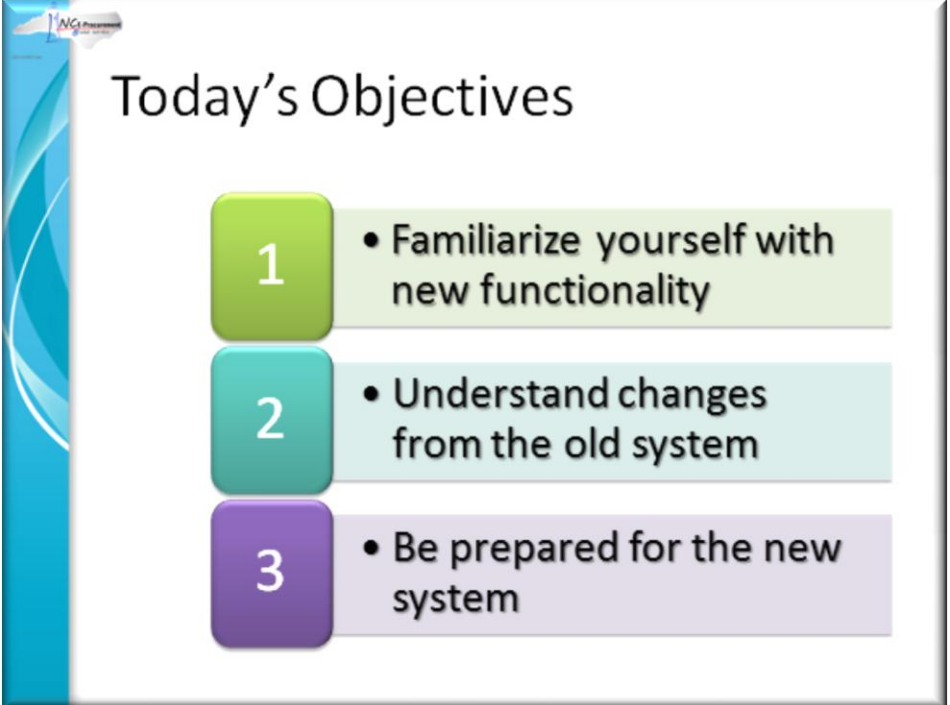
1. Keywords (e.g., pen) may be entered in the first free-text field next to the 'Search' button.
2. Supplier Part Number: If you know the Supplier Part Number of the Item for which you are searching, enter it here.
3. Manufacturer Part Number: If you know the Manufacturer Part Number of the Item for which you are searching, enter it here.



Training Formats: “What’s New” Sessions

“What’s New” classroom training and webinars provide an opportunity for users to learn in a live environment from the NC E-Procurement team

- “What’s New” sessions offer **focused instruction** on changes to the system and processes
- Sessions are **2-3 hours** in duration and will be held in two formats in the mid-May to mid-June timeframe:
 - Classroom training
 - Webinars

A presentation slide titled "Today's Objectives" with a blue decorative bar on the left. It lists three objectives in a vertical stack, each with a numbered square icon and a corresponding text box.

Today's Objectives

- 1 • Familiarize yourself with new functionality
- 2 • Understand changes from the old system
- 3 • Be prepared for the new system



Training Formats: “What’s New” Classroom Training

“What’s New” classroom training sessions give agency contacts hands-on access to the upgraded NC E-Procurement and face-to-face contact with the upgrade team

- **Classroom training** sessions will be held in the Raleigh area
- **Targeted audience** is Agency Security Administrators or other designated agency contacts
- Trainers will review a **“What’s New” presentation** and give participants an opportunity to try out business scenarios in the **training environment**





Training Formats: “What’s New” Webinars

“What’s New” webinars provide an opportunity for larger numbers of users to learn in a live, virtual environment from the NC E-Procurement team

- **Webinars** will cover the same “What’s New” presentation as the classroom sessions
- **Targeted audience** is any NC E-Procurement user
- Participants will register for a **live session** and receive access instructions
- Presenter will guide progression through presentation with participants viewing screen
- **Question & Answer** time will be provided
- Collaborate! Encourage your entity to attend webinars in small groups to learn together.





Training Formats: Online Training Modules

Online training modules provide a self-paced, on-demand environment in which users can refresh or build their NC E-Procurement knowledge.

- **New online training modules** will provide more detailed training on general system functionality, not just new features:
 - Requisitioning / Approving
 - System Navigation
 - Reporting
 - System Administrator / E-P Lite Administrator
 - Advanced Purchasing
 - Receiving (NCAS)
- Online training will be **available to users** on the NC E-Procurement web site to access individually on their schedule beginning in late May
- Training will include **demonstrations** with audio commentary and opportunities for participants to test their knowledge
- Online modules will be a valuable asset going forward for **onboarding new employees**



Questions?